



Town of Barrington

Tax Assessor's Office

283 County Road

Barrington, RI 02806

REQUEST FOR PROPOSALS FOR THE FULL REVALUATION AND RELATED SERVICES OF TAXABLE (AND EXEMPT) REAL PROPERTY LOCATED WITHIN THE CORPORATE LIMITS OF THE TOWN OF BARRINGTON, RI, EFFECTIVE DATE 12/31/2010

The Town of Barrington is seeking proposals for the Full Revaluation of all taxable (and exempt) real estate and related services. We hereby formally invite firms to submit a proposal for the above-described revaluation, to be installed on a Windows Network with a maximum of five (5) users. The Town of Barrington has approximately six-thousand, seven-hundred (6,700) parcels of real estate and nine hundred and fifty (950) personal property accounts.

Request For Proposal/Scope of Specifications may be obtained at the Barrington Town Hall, 283 County Road, Barrington RI (Clerk's Office) , Monday through Friday between the hours of 8:30am and 4:30pm.

All proposals **must** be submitted as specified in the RFP.

The Town of Barrington shall receive proposals until **November 24, 2010 at 2:00pm**

Contract will be awarded no later than **fifteen (15)** days after the date established for receiving proposals.

All proposals shall be sealed and addressed to the Tax Assessor's Office and marked:

"Town of Barrington, RI - Proposals for Full Revaluation & Related Services as of 12/31/10"

Please direct submission or inquiries to:

Tax Assessor's Office

C/O The Barrington Town Hall

283 County Road

Barrington, RI 02806

(401) 247-1900 x3

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The Assessor reserves the right to amend this proposal for the Full Revaluation Program, CAMA Software and related services at any time prior to the deadline for submission of proposals and to **reject any or all proposals received if it is determined to be in the best interests of the Town of Barrington, RI.**

All data entry must be done off-site and transferred to the municipal computer system. Any cost associated with the licensing of the CAMA system is **the sole responsibility of the Contractor.** The software must provide an interchange file to move data to the Town's current billing and collection system, as well as electronically transmit sales data to the Rhode Island Department of Municipal Affairs/Budget Department and yearly data dumps to "The Warren Group". Any conversion or software upgrade cost **must** be specified in your proposal. Any proposal must address the method and costs associated with the conversion of this data and the method for maintaining both the data and the values in-house. Any conversion is solely the Contractor's responsibility. All data entry will be the responsibility of the Contractor. If data and/or sketches cannot be converted electronically, please identify the means of conversion and the projected cost (if any) associated with this conversion.

All information pertaining to the Contractor's technical and management approach to completing this project, as well as the proposed cost, timetable and staffing plan, shall be presented in the proposal. The proposal must address, at a minimum, each of the issues set forth in the Request For Proposals in order to be considered responsive. Any proposal that does not respond to each issue in the Request for Proposals may be rejected by the Assessor as non-responsive.

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In addition to addressing each of the items in the specifications, the Contractor must submit, as part of its proposal, the following information:

1. A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor stating that the offer is effective for at least **ninety (90)** calendar days from the deadline for the submission of proposals.
2. A list of Rhode Island Municipalities for which the Contractor has completed Revaluation Programs for the last five years, and contacts for said communities
3. A list of Rhode Island Revaluation Contracts for which the Contractor is **currently** committed with a timetable for completion in each community
4. Description of the Contractor's public relations program that would be used during the revaluation.
5. Bid Bond or certified check for ten (10) percent of the proposal submitted.
6. A list of **Waterfront Municipalities** for which the Project Manager has managed revaluation
7. Listing of Rhode Island Municipalities for which the Contractor has used the Vision Version 6 CAMA software
8. Given the short timeframe involved, the number of people the Contractor will commit to this

TABLE OF CONTENTS

DRAFT

1. Definitions
2. Scope of Revaluation Update
3. Personnel and Office Hours
4. Protection of the Town of Barrington
5. Completion Date and Time Schedule (12/01/10 Starting Date)
6. Payment Schedule
7. Responsibilities of the Contractor
8. Assessment Specifications
9. Responsibilities of the Town of Barrington
10. Transmittal of Records to the Tax Assessor

INFORMATION FOR BIDDERS

- Article 1: Receipt and Opening of Bids
- Article 2: Preparation of Bid
- Article 3: Methodology for Evaluation of Proposals
- Article 4: Acceptance/Rejection of Bids
- Article 5: Conditions of Work
- Article 6: Time for Completion
- Article 7: Performance Clause
- Article 8: Bid Bond
- Article 9: Non-Collusion

Addendum

Requirements for Software Conversion

RFP SPECIFICATIONS

1. DEFINITIONS:

- 1.1 **Assessor:** The word "Assessor" shall mean the duly appointed Assessor of the Town of Barrington.
- 1.2 **Project:** The word "project" shall mean the Full Revaluation of all taxable (and non-taxable) real property & personal property in the Town of Barrington.
- 1.3 **Town:** The word "Town" shall hereinafter mean the Town of Barrington, Rhode Island.
- 1.4 **Contractor:** The word Contractor shall hereinafter mean the Contractor who will perform this project defined in section two.

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2. SCOPE OF REVALUATION UPDATE:

- 2.1 **Basic Scope:** Contractor understands that the project requires the complete re-assessment and revaluation of all taxable (and non-taxable) real property, **and all personal property** within the corporate limits of the Town of Barrington, Rhode Island. All work for the project shall be done in accordance with these contract specifications with an effective assessment date of **December 31, 2010**

Contractor will provide a description of the relevant standards consistent with Rhode Island State law to be utilized to conduct this revaluation project.

All work will be carried out and all forms, materials and supplies utilized by Contractor in this project shall conform to, and be carried out in accordance with the Rhode Island General Laws, and shall be subject to direct supervision and approval of the Tax Assessor of the Town of Barrington, Rhode Island.

The values to be determined by Contractor shall be the full and fair cash value, as defined in Section 44-5-12 of the Rhode Island General Laws, and shall be based upon nationally recognized methods of assessing. Farm Forest and Open Space properties shall be valued under RIGL 44-27 and 44-5-12

Contractor's revaluation update program will cover and include all property in the Town of Barrington in the following categories:

- A. All taxable real estate, land, buildings and improvements.
- B. All tax-exempt real estate, land, buildings and improvements.
- C. All taxable mobile homes and buildings and improvements on leased land.
- D. All public utility land and buildings.
- E. **Personal Tangible Property is included in this full revaluation.**

- 2.2 **Effective Date:** The effective date of this revaluation project shall be as of **December 31, 2010**, and the pricing and valuation by Contractor of all land, buildings and property under this contract shall reflect a full & fair cash value as of **December 31, 2010**.

2.3 **Parcel Count:**

Contractor's price for the revaluation is based upon the following **anticipated** parcel counts:

Code	Property Description	Number of Parcels
01	One Family Residence	5,630
02	Two-Five Family Residence:	159
03	Apartments	2
04	Combination	30
05	Commercial I	17
06	Commercial II	76
07	Industrial	2
08	Estate:	-
09	Farms:	-
10	Utility & Rails	-
	a. Real Estate	7
	b. Personalty	2
11	Seasonal Beach:	-
12	Miscellaneous	35
13	Residential Vacant Land	171
14	Commercial-Industrial Vacant Land	19
15	Other Vacant Land	51
33	Farm/Forest/Open Space:	-
	a. Real Estate	41
	b. Personalty	-
21	Residential Building-Leased Land	-
	a. Real Estate	-
	b. Personalty	-
22	Industrial Building-Leased Land	-
23	Residential Condominium	47
24	Commercial Condominium	25
25	Industrial Condominium:	-
26	Time Shared Condominium-Deeded	-
98	Commercial Building-Leased Land	-
	a. Real Estate	1
	b. Personalty	-
27	Dockaminium	-
70	EXEMPT: Cemeteries	7
72	EXEMPT: Church:	25
73	EXEMPT: Charter:	94
74	EXEMPT: Federal:	2
78	EXEMPT: Municipal:	137
79	EXEMPT: School:	25
80	EXEMPT: State:	32

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81	EXEMPT: Tax Sales:	4
		6,641

Code	Personal Property	Count
17	Commercial I	409
18	Commercial II	92
93	Antiques - Treasures:	1
94	Leased - Rented Machinery:	104
95	Boats:	-
96	Livestock:	-
97	Mobile Homes:	-
	a. Real Estate	-
	b. Personalty	-
99	Household Furnishings	-
16	Motor Vehicles:	-
44	Unregistered Farm Vehicles & Improvements:	-
45	Unregistered Private / Foreign Vehicles	-
66	Unregistered Construction Vehicles & Equipment:	-
19	Industrial	2
	TOTAL	608

- 2.4 The current basis of assessment is one hundred percent (100%)
- 2.5 The last full revaluation was effective as of **December 31, 2005 (12-31-05)**
- 2.6 The land area in the Town of Barrington is approximately 8.4 square miles
- 2.7 Building Permit History:

Year	Total Permits	New Single Family Dwellings
2010	507	16
2009	592	6
2008	703	37
2007	379	8
2006	751	24
2005	697	18
2004	647	31
2003	503	25
2002	554	16
9-Yr Avg.	593	20

(includes 10 new work-force homes)

(includes 22 in Sweetbriar & 4 in K/M Dvpt.)

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3. PERSONNEL AND OFFICE HOURS:

- 3.1 **Personnel:** Contractor shall provide experienced and qualified personnel, as hereinafter provided, and will comply with the requirements of the equal employment opportunity provisions of federal and state governments. Contractor shall submit to the Town written qualifications of all personnel assigned to this project.
- 3.2 **Qualifications of Personnel:** Contractor will comply with Rhode Island certification standards and the qualifications standards set forth in the Request For Proposal for all personnel assigned to this project. The Project Manager or Supervisor shall have not less than ten (10) years experience in revaluation projects. Reviewers and appraisers shall have not less than five (5) years of practical appraisal experience. Measurers and listers shall have at least three (3) year experience and training in this phase of the revaluation project. All data collection field personnel will be subject to a criminal record background check to be performed by the Barrington Police Department. All personnel shall be subject to the approval of the Assessor, and shall be removed from this project by the Contractor upon written recommendation of the Assessor, specifying in detail the reasons for the recommendations.
- 3.3 **Identification:** All Contractor field personnel shall carry suitable photo I.D. cards, which shall include an up-to-date photograph, supplied by Contractor and signed by the Assessor. All automobiles used by Contractor's field personnel shall be registered with the Town's Police Department giving license number, make, model year and color of the vehicle.
- 3.4 **Office Hours and Staffing:** Contractor shall maintain an office at the Barrington Town Hall, from the commencement of work on this project through the conclusion of the public hearings. This office shall be staffed with clerical staff as needed, as well as other qualified full-time persons so as to ensure the successful completion of this project in accordance with the completion dates set forth in the contract specifications and any addenda thereto.
- 3.5 **Conflict of Interest:** No Town employee or resident shall be employed by Contractor, except in a clerical capacity, without the written approval of the Tax Assessor & Town Manager.

4. PROTECTION OF THE TOWN OF BARRINGTON:

- 4.1 **Bonding:** Contractor will secure the faithful performance of the terms of this agreement by furnishing to the Town a Performance Surety Bond in the amount of this contract, which bond shall be issued by a reputable bonding company licensed to do such business in the State of Rhode Island. Said bond shall be delivered to the Town prior to the commencement of actual work and shall be in a form satisfactory to and approved by the Town's Solicitor. This bond shall include the appeal requirements of these specifications.

It is understood and agreed, upon completion of approved delivery of the revaluation to the Town, that the performance bond shall be reduced to **twenty-five (25)** percent of the value of the contract to cover the defense of all appeals. This reduced amount of bond shall become effective after the revaluation has been completed and approved by the Assessor and after the completion of the duties of the Assessing Board of Review, as defined herein. The reduced amount of the bond shall remain effective for **two** complete calendar years beyond completion of the revaluation and/or until a final resolution in the courts of any timely appeals taken from the doings of the Assessing Board of Review on the Grand List of **December 31, 2010**, whichever ~~may come first~~

4.2 **Insurance:** Contractor will, at its own expense, provide and keep in force:

- A. **Workers Compensation Insurance:** (per Rhode Island Law) and Employer's Liability Coverage, Coverage A at statutory limits and Coverage B at limits of \$100,000/ \$500,000/ \$1,000,000.
- B. **Broad Form Commercial General Liability Coverage:** Which names the Town as additional insured, written on a 'per occurrence' basis and with an aggregate cap no less than three (3) times required limit: \$1,000,000 Combined Single Limit (C.S.L.).
- C. **Automobile Liability Coverage:** including coverage for owned, hired or borrowed vehicles, \$1,000,000 Combined Single Limit (C.S.L.).
- D. **Defense of Town:** All insurance companies shall have the duty to defend the Town against liability or property damage claims arising from the conduct of Contractor and/or agents or employees.
- E. **Insurance Certification:** An Insurance certificate shall be required to be filed with the Town, certifying coverage and limits of automobile, bodily injury liability, property damage liability and worker's compensation. "The Town is named as Additional Insured on the Insurance coverage named herein for the claims arising out of the contractors performance of the contract herein".
- F. **Patent/Copyright Liability:** Contractor shall hold the Town of Barrington harmless from any liability of any nature or kind, including costs and expenses for, or on account of, any patented or copyrighted equipment, materials, articles or processes used in the performance of the contract.

4.3 **Delays and Penalties:** Failure by Contractor to complete all work prior to the time table established by the Town and the Contractor shall be cause for a penalty payment by the Contractor, on request of the Assessor, in the amount of **One-Thousand Dollars (\$1,000)** per day beyond the specified date of completion, provided the Town delivers its responsibilities. For the purposes of this penalty only, completion of all work (excluding hearings through final appeals), is defined as follows:

- A. Completed property record cards with all sketches, measurements, listings, pricing, photographs, review and final valuations.
- B. Completed transfer of assessment data to the Town's existing CAMA system.
- C. Assessment notices, addressed and in envelopes prepared for mailing.
- D. Completion of all items as set forth on the Schedule of Progress.

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This penalty, if applied, shall be deducted from the contract price. Delays occasioned by war, strike, explosion, acts of God or an order of court or other public authority are excepted.

4.4 **Bankruptcy, Receivership, Insolvency:** If the Contractor shall file a petition in bankruptcy or insolvency, or for reorganization under any bankruptcy act, or shall voluntarily take advantage of any such act by answer or otherwise, or shall make an assignment for the benefit of creditors, then the Town shall have the right, at its option and without prejudice to its rights hereunder, to terminate the contract.

4.5 **Termination:** If either party fails to fulfill its obligations under this agreement in a timely and satisfactory manner, or shall violate any of the covenants, conditions or stipulations of this agreement, which failure or violation shall continue for thirty (30) days after written notice of said failure or violation is received by the offending party, unless the correction of such failure inherently requires a longer period of time and provided further that the applicable party is proceeding diligently to correct the failure, then the opposing party shall thereupon have the right to terminate this agreement by giving written notice to the offending party of such termination and specify the effective date thereof, at least seven (7) days before the effective date of such termination.

In the event of termination, all finished work and documentation, complete and incomplete, shall, at the option of the assessor be delivered to the Town of Barrington. Contractor shall be entitled to the release of the performance bond and to receive just and equitable compensation for any work performed under this agreement completed prior to the date of termination.

Notwithstanding the above, in the event of termination, neither party shall be relieved of liability for its breach of this agreement.

4.6 **Hold Harmless Agreement:** Contractor shall, at all times, defend, indemnify, protect and hold harmless, the Town and its officers, agents and employees from any and all claims or demands for damage for bodily injury, including death or property damages sustained by any party, including officers, agents and employees of Contractor. Said hold harmless clause shall include, but not limited to investigation, defense and settlement or payment or judgment of any liabilities.

4.7 **Severability:** In the event any part of any clause or provision of this contract or contract specifications is judicially determined to be unenforceable, it shall be deemed severable from the remainder of that clause or provision and such remainder shall be binding upon the parties to this contract.

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- 4.8 **Waiver:** No action or failure to act by the Town shall constitute a waiver of any right or duty afforded it under the contract or contract specifications.
- 4.9 **Misrepresentation or Default:** The Town may void this agreement if the Contractor has misrepresented any offering or defaults on any contract with a Rhode Island municipality. The Contractor shall, also, immediately notify the Town of any claim or case formally brought against the Contractor.

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5. **COMPLETION DATE AND TIME SCHEDULE:**

- 5.1 **Signing of Contract:** Within ten (10) days after receipt of notice of acceptance by the Town of its bid, as possibly revised by negotiations, the Contractor shall execute with the Town a contract in the form agreeable to the Town and incorporating these contract specifications.
- 5.2 **Changes and Subletting of Contract:**
- A. **Changes:** Contractor understands that changes in these contract specifications or in the contract will be permitted only upon written mutual agreement of Contractor and the Town.
- B. **Subletting:** Contractor shall not assign, sublet and/or transfer the contract or any interest or part therein without first receiving written approval from the Town. It shall be mutually agreed and understood that said consent by the Town shall in no way release Contractor from any responsibility as covered in these contract specifications and contract.
- 5.3 **Time Schedule:** The actual Full Revaluation will be started at the convenience of the Contractor, but no later than **December 15, 2010**.

A. **Completion Dates:** The proposal should include a recommended schedule for the following:

1. Data collection of Building Permits – Residential/Commercial/Exempt
2. Land study and values.
3. Building cost manual
4. Complete study of market rents, expenses, and capitalization factors
5. Complete neighborhood delineation.
6. Complete field review of all residential properties.
7. Complete field review of all commercial, industrial, public utility, and tax exempt

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- 5.4 **Assessment Date:** The completed assessments, upon approval of the Tax Assessor, will serve as a basis for assessments, effective as of **December 31, 2010**.
- 5.5 **Delays:** Contractor shall not be liable for delays caused by reasons of war, strike, explosion, acts of God, order of court or other public authority.

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6. **PAYMENT SCHEDULE:**

- 6.1 **Periodic Payments:** Payments shall be paid in the following manner: thirty (30) days after the execution date of this contract and at the end of each thirty (30) day period thereafter covered by this contract, Contractor will certify, by written progress report to the Assessor, the percentage of total work completed during the said thirty (30) day period. The Town will review each report and within twenty (20) business days of receipt, either approve it for payment as follows or return it to Contractor with a written statement of reasons for its rejection. Upon determination by the Assessor that Contractor's work during said period is accurate, the Town will pay Contractor a percentage of the total contract price equal to the percentage of work performed less **fifteen (15%)** percent, which is to be retained by the Town to ensure full and satisfactory performance of the contract.

If the Tax Assessor determines that the Contractor's progress report is inaccurate, the Assessor shall give written notice as stated above, specifying exactly what is unsatisfactory by item, and Contractor shall make every reasonable attempt to correct the inaccuracy. The Assessor shall retain the right to delay payment, only for the specified item, until said item is resolved to the satisfaction of both the Assessor and Contractor. Upon satisfactory resolution, the Assessor shall pay Contractor said amount due, less **fifteen (15%)** percent.

Upon completion of the duties of the Assessing Board of Review, with respect to the **December 31, 2010** Assessment Date, and upon determination by the Town and certification by the Assessor that Contractor has performed fully and satisfactorily all its obligations and requirements under the contract and/or contract specifications, the retained **fifteen (15%)** percent of the contract price will be paid to Contractor.

- 6.2 **Fiscal Year Limitations:** The Full Revaluation cost shall be paid in the **2010/2011** Town fiscal year according to the provisions of this section and subject to the appropriation of necessary funds by the Town's fiscal authority.

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- 6.3 **Suggested Schedule and Percentage of Completed Work:** The Contractor shall submit a proposed progress schedule, including, but not limited to, the following (with completion dates for the various phases);
- A. Planning & Organization (including a "Go-Live" date with the new system and a "Drop-Dead" date for newly converted data for the next years budget)
 - B. **Personal Property inspection & Valuation**

- C. Data Collection - Building Permits
- D. Residential Analysis & Valuation
- E. Commercial Analysis & Valuation
- F. Field Review
- G. Informal Hearing Notices & Interviews
- H. Project Finalization
- I. Total

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7. **RESPONSIBILITIES OF THE CONTRACTOR**

7.1 **Public Relations:** The parties of the revaluation project recognize that good public relations are required in order that the residents and taxpayers of the Town may be informed as to the purpose, benefits and procedures of the revaluation program. Contractor shall provide reasonable assistance to the Assessor in conducting a program of public information through the press and other media, such as meeting with citizens, service clubs and property owner groups as a means of establishing an understanding of, and support for, the revaluation program and sound assessment administration. Contractor shall supply visual aids and other media at its disposal to this end. All public releases will be approved by the Assessor prior to its release.

7.2 **Conduct of Contractor Employees:** As a condition of this contract, Contractor's employees will, at all times, treat the residents, employees and taxpayers of the Town with respect and courtesy; Contractor shall take appropriate and meaningful disciplinary measures against those who violate such terms of this provision.

7.3 **Records:**

- A. **General Provision:** Contractor will provide all record cards, property record cards, owner cards, supplies, equipment, forms, literature and papers to be used in this project at no additional cost to the Town.

Contractor may, at its option and at no cost to the Town, utilize computers for its information processing, provided that the computer and appropriate machine-readable databases (such as magnetic tape and/or other automated storage media) are located in the Town, or elsewhere if the Assessor gives his prior written consent with whatever conditions and reservations he may deem appropriate to the best interest of the Town.

- B. **Additional Supplies:** All forms shall be subject to approval by the Assessor as to format, design, content, shape, size, color, quality and quantity. At the completion of the project, Contractor will provide the Town with an additional supply of all such forms; the total number of each form to be supplied shall not exceed ten (10%) percent of the Town's total parcel count.

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- C. **Records are Town's Property:** The original or a copy of all records and computations, including machine-readable database, made by Contractor in connection with any assessment of property in the Town shall, at all times, be the property of the Town and, upon completion of the project or termination of this contract by the Town, shall be left in good order in custody of the Assessor. Such records and computations shall include, but not be limited to:

1. Plat Maps
2. Land value maps
3. Materials and wages, cost investigations and schedules
4. Listing cards, owner cards, property record cards with property valuations and separate sketch cards, (if any)
5. Sales Data
6. Capitalization rate data
7. Depreciation tables
8. Computations of land and building values
9. All letter or memoranda to individuals or groups explaining methods used in assessments
10. Operating & Income Statements of income properties

- D. **Assessor's Records:** Contractor will use a system approved by the Assessor for the accurate account of all records and maps which may be taken from the files of the Assessor in connection with assessment work. All such records and maps shall be returned immediately. None of the Assessor's records shall be taken outside of the corporate limits of the Town without prior written permission of the Assessor. The Assessor will permit Contractor to copy all residential building sketches from existing field cards, together with the outside dimensions of all auxiliary buildings such as garages, barns, sheds and swimming pools. Contractor will be permitted to copy and sketch all commercial and industrial properties which are presently outlined on existing Assessor's field cards.

- E. **Property Record Cards:** Contractor will complete property record cards, commonly referred to as "street cards" or "field cards", filed by **Plat/Lot order**.

- F. **Valuation Information (PROPERTY RECORD CARDS):** These cards shall contain all manner of information affecting value, including, but not limited to, information as to location of property, classification as to usage, owner of record, Town account number, source of title, size, shape and physical characteristics of land, with the breakdown of front feet, square feet or acreage as applicable, along with unit of value applicable to each, public utilities available, public improvements, zoning regulations in effect as of the assessment date.

- G. **Sketches:** Contractor will sketch all new physical improvements, giving a listing of all interior and exterior construction details, quality of construction, age, condition, replacement values, percent of physical and functional depreciation, depreciated values, fair market value, as well as 100% percent assessment value will be shown. Sketches of buildings, including dwellings, shall be drawn to scale with dimensions given on the property record card.

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- 7.4 **Assessment Notices:** At the close of the revaluation, a notice shall be sent, at Contractor's expense including envelope by First Class Mail, to each owner of record, setting forth the valuation that has been placed upon the property identified in the notice, provided old assessments are provided on magnetic media and in conformity with the Rhode Island General Laws. Further, enclosed with such notice shall be a letter specifying the dates, times and place of the informal public hearings. Such notices and letters shall be subject to the prior written approval of the Assessor. A duplicated copy, arranged alphabetically by the owner's name, shall be left with the Assessor.

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- 7.5 **Informal Public Hearings:** At a time mutually agreeable to the Assessor and Contractor, but following completion of all review work by the Assessor and Contractor, Contractor will hold informal public hearings at such times and at such locations as the Assessor may specify so that owners of real property, or their legal representatives, may appear at specified times to discuss with qualified members of Contractor's staff the manner and methods of arriving at value. Informal public hearings, at the Assessor's discretion, may be held on weeknights and Saturdays.

Contractor will provide a sufficient number of qualified personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer shall be given consideration and adjustments shall be made where warranted. The public hearings shall be held for a minimum of three weeks. Adjustments to the construction detail will not be allowed unless the interior has been inspected by the Contractor.

Contractor will provide person(s), or their legal representative, who appear(s) at a hearing, a form indicating whether or not Contractor will re-inspect the property(s) being questioned. Such decision to re-inspect will be at the reasonable discretion of Contractor. Any such re-inspection shall be made as soon as possible. This form shall be approved by the Assessor and provided by Contractor. The completed and signed forms shall be turned over to the Assessor at the conclusion of the hearings. Contractor will, at its own expense by First Class Mail, notify each taxpayer who has appeared at an informal public hearing of the results of that hearing as soon as the results are determined, and the form of such notices shall be subject to the prior expressed approval of the Assessor.

- 7.6 **Board of Assessment Review:** The Contractor will have a qualified member or members of its staff with first hand knowledge of the project and Contractor's duties under the contract, available for attendance at any and all deliberations of the Board of Assessment Review held after the completion of the revaluation, Sundays excluded, to assist in the settlement of complaints and to explain the valuations made.

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- 7.7 **Litigation:** In the event of appeals to the courts, Contractor will furnish a competent witness/witnesses with first hand knowledge of this project and Contractor's duties under the contract to defend the valuation of the assessed properties; it being understood that Contractor shall furnish said witness/witnesses on any court action for ten (10) days at no charge. After the initial ten (10) days, a per diem rate will be charged (include per diem rate in the Cost Proposal). Contractor will provide supporting data, including written appraisals by a **Rhode Island Certified Real Estate Appraiser** for any said court appeals. Contractor will also comply with any request by the Town to answer any interrogatories, provide witnesses for depositions or to otherwise participate in the discovery process pertaining to any litigation described in the first sentence in this paragraph.

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Contractor shall not be held responsible for any assessments changed from the original revaluation figure by parties other than Contractor, unless the original figure determined by Contractor was unreasonable, unsupportable or erroneous in the view of the Assessor.

- 7.8 **Information:** Contractor will give the Assessor any and all information requested pertaining to the revaluation work for a period of two years after completion of the duties of the Assessing Board of Review on the **December 31, 2010** Grand List without further cost the Town.

7.9 **Building Cost Schedules:**

- A. **General:** Contractor will prepare building cost schedules for usage in the program hereinafter specified. These schedules will reflect the unit-in-place method, based upon square foot or cubic foot area of building, as applicable. These schedules shall be used in computing the replacement cost in the Town for all residential, commercial, industrial and farm construction. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees, and all other direct and indirect costs of construction. Before final acceptance, they shall be proven by testing against known sales. All finalized schedules shall be approved by the Assessor before their adoption and usage by Contractor.
1. **Residential:** Residential cost schedules will include schedules for various classifications, types, models and story heights normally associated with the residential buildings. The schedule will be flexible, with special sections reflecting the various additions and deductions for construction components from the base specifications such as; wall and floor types, interior finish, etc., along with prices for different types of heating systems, bathrooms, fireplaces, porches, breezeways, attached and unattached as well as basement garages, and schedules for other building improvements usually found on residential property (swimming pools, barns, sheds, garages, tennis courts, greenhouses, solar designed, etc.)

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2. **"Exceptional Homes":** The Contractor will also include schedules for complex high value residences of up to 20,000 square feet of living area with costs ranging from approximately \$200 to \$700 per square foot. Said homes may include; architectural columns, balustrades, bathhouses, deluxe appliances, designer fixtures, fountains, ornate detailing, radiant flooring, spas, stables, stained glass and more.

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3. **Commercial:** Commercial building cost schedules shall be prepared in unit costs of materials in place and charted on a per square foot basis and shall be prepared for various story heights and contain all additions and deductions for construction components from base specifications.
4. **Industrial and Special Structures:** Cost schedules for industrial and special purpose structures shall be prepared in unit costs of material in place and charted on a per square foot basis, and shall be prepared to contain all the additions and deductions for construction components from base specifications.
5. **Farm:** Cost schedules for farm structures shall be prepared for square foot and cubic foot costs for various types of farm buildings including, but not limited to: barns, sheds, silos, milk houses, coops, etc.

7.10 **Depreciation Schedules:** The depreciation schedules, or methods Contractor will use in determining the amount of depreciation, shall reflect the normal and accepted depreciation rates of building according to classification and condition. These schedules or methods shall cover residential, commercial, industrial and farm buildings, and shall be approved by the Assessor prior to their use by Contractor.

7.11 **Schedules for Town:** Contractor will supply and leave for the Town not less than three (3) copies of all the above required building cost schedules and depreciation schedules for the Town's usage, one copy of which shall be turned over to the Assessor upon approval of the schedules, as outlined herein. The schedules shall be in the form of a bound manual.

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8. ASSESSMENT SPECIFICATIONS:

8.1 **Assessment of Land:** Contractor will assess all land within the Town: residential, commercial, industrial, agricultural, special use, public utility and tax exempt.

- A. **Land and Value Study:** Land shall be valued on the basis of an analysis of all sales data occurring during the two year period prior to **December 31, 2010**. The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the Assessor.

Contractor shall make a careful investigation of this data and shall consult owners, realtors, banks and other sources of information relative to sales of property within the Town. All factors affecting the final value of land shall be considered, such as: location, zoning, inland wetlands, topography, soil condition, size, shape, view, utilities, vacancy, etc.

Non-conforming uses and zoning variances shall be considered in establishing values. A brief description of each lot or parcel of land, together with the valuation computations, shall be entered on the field record card.

- B. **Land Value Inspection:** Contractor will make a physical inspection of each parcel and make necessary adjustments in value to compensate for; views, topographical irregularities (**such as high banks**), steep slopes, swamps, irregular shapes or anything else which may detract from the usefulness of the land. Non-conforming uses and zoning variances shall be considered in establishing values.
- C. **Land Value Units:** Contractor will prepare land unit values, subject to the approval of the Assessor, by: square foot, acreage, front foot, water-front footage, site value, etc. whichever, in the judgment of the Assessor, most accurately reflects the market for the assessed land.
- D. **Land Value Map:** Contractor will delineate the approved land value units on all streets and acreage in the Town on a suitable map to be provided by the Town. The land value map shall be returned to the Town prior to the completion of the revaluation contract.
- E. **Neighborhood Delineation:** After consideration of the environmental, economic and social characteristics of the Town, Contractor will, with the cooperation and approval of the Assessor, delineate "neighborhood" boundaries within the Town. Each neighborhood will, in Contractor's opinion, exhibit homogeneous characteristics. Each neighborhood will be assigned a separate identification code, which will be used for valuation. These neighborhood numbers shall be recorded and maintained on property record cards and the computer database.

8.2 Assessment of Residential Buildings and Structures:

- A. **Physical Details:** Contractor will make a careful and complete listing of physical construction details of all residential buildings and structures and all structural improvements appurtenant to residential property in the Town on proper forms, as previously covered in these specifications.
- B. **Inspection:** Contractor guarantees to make a careful inspection of the complete interior of at least ninety-five (95%) percent of all new construction properties, excluding those wherein the owner refuses permission to inspect or fails to respond to Contractor's notification letter. For each property above the allowable five (5%) percent which is not properly inspected, the Assessor may deduct Twenty Five Dollars (\$25.00) from the contract price to be paid to Contractor, such amount deemed by the parties hereto to be fair and equitable estimate of the damages to the Town if less than ninety-five (95%) percent of all properties, excluding those properties described in the previous section are inspected.
- 1 **Verification:** Contractor's listers will have each interior inspection verified, including the date of the inspection, by having an adult owner or resident of each building or dwelling unit sign the field card.
 - 2 **Entrance Refused:** When entrance to a building for an inspection is refused, Contractor's listers will make note of the fact and within two working days, notify the Assessor in writing, giving the facts as to the time of the visit, and, if possible, the name of the party refusing entrance and other pertinent information. The Assessor shall review the situation and if he shall be unable to gain the cooperation of the party involved, he shall so notify Contractor and they shall proceed to estimate the value of the building on the basis of facts ascertainable without entry and make adequate notations of the lack of cooperation and manner arriving at value conspicuously on the record card.
 - 3 **Lister Identified:** The property record card shall indicate the initials of the lister and the date(s) of the listing.
 - 4 **Call-Backs:** Where necessary, Contractor will make two call-backs, one of which must be on a weekday after 5:00 PM and/or on a Saturday. The time and date at which the call-back was made shall be duly noted on the field record card by the lister making the call-back.
 - 5 **Notification:** If after two call-backs contact was not established with the property owner, a notification letter, approved by the Tax Assessor, shall be sent via First Class Mail to the property in question by Contractor, notifying the property owner that the representatives of Contractor were not able to make contact and request that, within a prescribed time limit, the property owner contact Contractor by telephone, or by mail, for alternative arrangements for the inspection of the property. Failure of the property owner to respond to the notification letter will place that parcel in the ninety-five (95%) percent "entry" group.

C. Exterior Inspection:

- 1 **Perimeter Review:** The perimeter of all improvements shall be measured for accuracy. All improvements shall be measured to the nearest foot.
- 2 **Outline Sketch:** An outline sketch prepared to scale shall be entered into CAMA system giving dimensions to the nearest foot.
- 3 **Field Recording:** Physical data of the land parcel shall be recorded in the field.
- 4 **Photographs:** A digital photograph (with date imprints) of the primary building must be supplied with the data collected. An additional digital photograph must also be included if the parcel will be receiving either an increase in value (i.e. water-views) or a decrease in value (i.e. commercial influence) of said influence. Digital images must be compatible with the CAMA software package.

- 8.3 **Review:** All properties shall be reviewed in the field by Contractor's personnel qualified as reviewers, as previously prescribed in these contract specifications. The properties shall be reviewed for classification, correct listing of information, final value and to assure that they are correlated to comparable properties. The Assessor shall be notified of the dates of reviewing and be entitled to accompany the reviewers during this phase of the revaluation.

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8.4 Pricing and Valuation:

- A. **Full & Fair Cash Value:** Pricing and valuation of all land and buildings must reflect the full & fair cash value as of **December 31, 2010** and shall be done from, and in accordance with, the previously approved manuals and schedules and contract specifications.
- B. **Final Valuation:** The final valuation shall be the full & fair cash value of the structure plus the full & fair cash value of the land; such full & fair cash values to be as approved by the Assessor. In arriving at the full & fair value of the structures, replacement cost less depreciation from all causes may be considered, along with all other factors affecting the value of the property, all of which shall be noted on the property record card.

8.5 Assessment of Commercial, Industrial, Public Utility and Special Purpose Properties:

- A. **General:** All commercial, industrial, public utility and special purpose buildings shall be inspected, classified, priced and reviewed in the same manner as residential properties as set forth above, except that the dimensions of all buildings shall be to the nearest foot and the height of the building shall also be recorded on the property record card.
- B. **Description:** All buildings shall be identified and described as to component parts of construction, size, area, age, usage and present occupant(s)) on the proper forms, as previously prescribed in these contract specifications.

- C. **Income Approach:** Income and expense data gathered by the Town shall be utilized by Contractor for income producing properties. Any income and expense data, including forms with accompanying summary reports and rent schedules, when used by Contractor shall become the property of the Town.

All information filed and furnished shall not be of public record and is not subject to the provisions of Chapter 38-2 (Access to Public Records) of the Rhode Island General Laws. From these returns and other data sources, Contractor will establish market or economic rent and expenses for income producing properties.

Contractor shall also develop capitalization rates by investigating sales and income data. Contractor shall establish rates for various classes of property, which the Town may elect to have checked by bankers, investors and appraisers to ensure their accuracy. When the rates and methods have been approved by the Assessor, Contractor will perform the income approach by using both actual and economic income and expenses.

- D. **Plot Plan:** A plot plan shall be made of all industrial properties showing the locations and identification of the buildings, drawn to scale, and yard improvements.
- E. **Yard Improvements:** All yard improvements shall be listed and valued separately.
- F. **Fixed Equipment:** All fixed machinery and equipment serving a building and taxable as real estate shall be listed within that building and priced in accordance with procedures as outlined in the applicable price schedule. If a question exists whether certain machinery or equipment is taxable as real estate, Contractor shall bring that question to the attention of the Assessor to be bound by his determination.

- 8.6 **Commercial Review:** A final review and inspection shall be made in the same manner and for the same purposes as prescribed for residential properties. The reviewer shall be competently trained and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building for which he/she is responsible.

8.7 **Control and Quality Check:**

- A. **Field Checks by Assessor:** The Assessor shall spot check, in the field, properties picked at random by him, with or without Contractor's Supervisor.

- 8.8 **Building Permits:** The Assessor shall screen and make available to Contractor all building, plumbing, mechanical, electrical & demolition permits (or copies thereof) issued during the course of the revaluation to determine that all new construction, additions and remodeling have been included in Contractor's assessments.

- 8.9 **Incomplete Construction:** Contractor will plainly tab, with filing tabs approved by the Assessor, all property cards which have incomplete improvements as of **December 31, 2010**. The property record card shall show the percentage of completion and reflect the percentage of completion in the valuation as of that date.

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9. **RESPONSIBILITIES OF THE TOWN OF BARRINGTON:**

- 9.1 **Nature of Service:** It is clearly understood and agreed that the services rendered by Contractor are in the nature of assistance to the Assessor and all final decisions as to proper valuations, taxable or tax exempt, shall rest with the Assessor.
- 9.2 **Cooperation:** The Assessor, Town and Town employees will cooperate with and render all reasonable assistance to Contractor and its employees.
- 9.3 **Items Furnished by the Town:** The Town shall furnish or make available the following:
- A. **Maps:** The Town shall furnish one set of updated Town plat maps showing street, property lines and parcel identification numbers.
 - B. **Land Dimensions:** The Town shall make available to Contractor lot sizes and total square footage of all pieces of property where the maps or present records fail to disclose measurements or acreage.
 - C. **Zoning:** Town shall make available current Town building zone regulations and zoning map.
 - D. **Record Cards:** The Town will make available the present property record cards only for the copying by Contractor of the following data: owner of record, location of property, address of owner, deed references, map and lot reference, age and date of construction of all buildings, lot size or amount of acreage of properties.
 - E. **Property Transfers:** Contractor will make available to the Town the property record cards on a regular basis for an updating of all property splits and transfers occurring after the initial printing of the new property record cards by Contractor.
 - F. **Building Permits:** The Town shall make available all building permits or copies thereof during the course of the revaluation project. All building permits shall be returned to the Town.
 - G. **Identification:** The Town shall furnish letters or cards of introduction and authority to inspect real estate in the Town.

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- H. **Signing of Communications:** The Town shall sign, by the Tax Assessor or the Town Manager, communications to be mailed at Contractor's expense for the purpose of contacting a property owner for inspection of the property and for the purpose of obtaining the property owner's income and expense information if such is needed for the income approach to value of commercial or industrial properties.
- I. **Mailing Address:** The Town shall make available, through the Assessor's and/or Tax Collector's Office, the current mailing address of all property owners.
- J. **Office Space:** The Town shall furnish to Contractor sufficient office space to carry out the terms of this contract. The Town shall provide installation of one telephone line and Contractor shall be responsible for all monthly charges on said line for the duration of the project.
- K. **Media:** The Town shall have information above available on magnetic media for the purposes of creating a legal file on Contractor's computers during initiation.
- L. **Obligation to Keep Current:** The Town shall update the information specified above as often as necessary
- M. **Sales Information:** The Town shall provide copies of all sales information available to the Town with respect to transfer of parcels.

10. **TRANSMITTAL OF RECORDS TO THE TAX ASSESSOR:**

Regular periodical delivery of assessments, as completed and in accordance to a schedule agreeable to the Assessor, shall be turned over the Assessor for review. All assessments of buildings, either completed or under construction, and all completed and corrected records shall be turned over to the Assessor as of **April 15, 2011**. The final inspection and review shall take into consideration any known or apparent changes in the individual property since they were first inspected in order that the final assessment of property shall be assessed as of **December 31, 2010**.

This information and/or assessments and records shall not be made public until after the informal public hearings, except to the extent public access may be compulsory under the provisions of the applicable law.

It is understood and agreed that the re-assessment of properties covered by this agreement shall conform to the procedures and technical requirements of the Assessor, unless otherwise provided herein. Contractor, through its supervisor, shall be responsible to the Assessor and, at least once a week, shall meet with said Assessor to discuss the progress and various other details of the project.

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INFORMATION FOR BIDDERS

ARTICLE 1. RECEIPT AND OPENING OF BIDS:

- A. The Town of Barrington invites contractors to bid on a **Full Revaluation** of all Real and Exempt Property in the Town of Barrington, effective **December 31, 2010**, for ultimate approval by the Barrington Town Council. Bid Specifications may be picked up between the hours of **8:30am** and **4:30pm** at the office of the Town Clerk, c/o the Barrington Town Hall, 283 County Road, Barrington RI 02806

The Town will receive bids at the office of the Tax Assessor, at the Barrington Town Hall, until 2:00 PM on **November 24, 2010**, where they will be opened and publically read. The packages (three copies) containing the bids must be sealed, addressed to The Tax Assessor's Office, c/o The Barrington Town Hall, 283 County Road, Barrington RI 02806, and designated as "Town of Barrington, Rhode Island - Proposals for Year 2010 Revaluation Services", and must contain separate envelopes for the Cost Proposal and the Technical Proposal.

- B. The Town may consider invalid any bid not prepared and submitted in accordance with the provisions hereof and may waive any informality in or reject any and all bids. Any bid may be withdrawn prior to the above-scheduled time for the opening of bids or authorized postponement thereof. Any bid received after the time and date specified **will not be considered**. No bidder may withdraw a bid within thirty (30) days after the actual date of the opening thereof.

ARTICLE 2. PREPARATION OF BID:

- A. All bids must be prepared in conformity with and shall be based upon and submitted subject to all requirements of the specifications together with all addenda thereto.
- B. Each bid package must be submitted in sealed inner and outer envelopes bearing on the outside of each envelope the name of the bidder, his/her address and the name of the project for which the bid is submitted. The bid packages shall be clearly labeled "BID DOCUMENTS" so as to guard against opening prior to the time set therefore and no blame shall be attached to any agent or employee of the Town for the opening of any bid not so marked.

ARTICLE 3. METHODOLOGY FOR EVALUATION OF PROPOSALS

- A. **Overview:** This section discusses the steps that will be used to evaluate the proposals, determine the most advantageous proposal and select a contractor. These steps include the application of minimum comprehensive criteria, assignment of a composite rating, and the selection of the most advantageous proposal.

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B. Screening Proposals for Responsiveness and Responsibility:

1. After opening the technical (non-cost) proposals, the Town of Barrington will examine each proposal to determine whether it meets all of the proposal submission requirements and minimum criteria specified in the RFP.
2. Any proposal which fails to include all of the information or documentation specified in the proposal submission requirements and non-responsive may be rejected. Any Contractor who fails to meet any of the standards set forth as minimum criteria is non-responsive and can be eliminated from further consideration.
3. In determining the responsiveness of a proposal, the Town of Barrington may waive minor informalities or allow the Contractor to correct them. Minor informalities are minor deviations, insignificant mistakes, and matters of form rather than substance of the proposal that can be waived or corrected without prejudice to other Contractors, potential Contractors, or the governmental body.
4. The Town of Barrington will correct a proposal if a mistake and the intended offer are clearly evident on the face of the proposal document. In such a case, the Town of Barrington will make the correction, and notify the Contractor in writing; the Contractor will not be permitted to withdraw its proposal. Other than to make such a correction, the Town of Barrington will not correct or change a proposal.

C. Evaluation of Proposals Using Evaluation Criteria: Evaluation criteria reflect those standards or attributes that are essential to satisfactory performance of the contract to be entered into pursuant to this RFP. The minimum criteria will be used to identify responsive and responsible proposals. A responsive proposal is one that contains all of the forms and information, and offers all of the equipment, supplies, or services requested in the RFP. A responsible proposal is one that demonstrates the capability, integrity, and reliability of the Contractor to perform under the contract to be awarded.

D. Evaluation of Proposals Using Comparative Evaluation Criteria All proposals that meet the minimum criteria will be evaluated further. The evaluator will prepare written evaluations for each such proposal in accordance with the comparative evaluation criteria detailed in this RFP. They will be used to rate each comparative evaluation criterion. The record of the proposal evaluations will show the rating assigned for each evaluation criterion and the reasons for each rating.

E. Assigning Composite Ratings: After proposals have been assigned ratings on the basis of each evaluation criterion, evaluators will assign composite ratings to the proposals.

F. Determining the Most Advantageous Proposal The most advantageous proposal shall be determined from responsible and responsive proposals by taking into consideration the price and the evaluation criteria contained herein. Evaluating the proposals and determining the most advantageous proposal is a four-step process that includes the following:

- 1 Review of minimum criteria
- 2 Review of comparative criteria
- 3 Assigning a composite rating
- 4 Selecting the most advantageous proposal

1. Minimum Evaluation Criteria

- A. **Overview:** The Town will evaluate each proposal to determine whether it meets the minimum evaluation criteria set forth below. Minimum Evaluation Criteria are considered essential to satisfactory performance of the scope of work outlined in this RFP. Contractors must check "Yes" or "No" for each and every item. Only those proposals for which an authorized representative of the Contractor has unconditionally checked "Yes" for each of the following requirements will be accepted for further evaluation.

Submission Requirements: Technical Proposal

- | | |
|--|--|
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 1. Was the proposal delivered to the Tax Assessor's Office prior to the deadline for receipt of proposals and in accordance with the instructions in the advertisement or addendum? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 2. Does the proposal conform to the RFP in all respects? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 3. Has an authorized representative of the Contractor provided a cover letter, signed the proposal where required and returned each of the following forms as part of the technical proposal? <ol style="list-style-type: none"> a. All Contractor Response Forms and Questionnaires b. Cost Proposal Form |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 4. Are all copies exact duplicates of the original? |

Submission Requirements: Cost Proposal

- | | |
|--|---|
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 1. Was the cost proposal delivered separately from the technical proposal in a separate package, clearly labeled, in strict accordance with the instructions set forth in this RFP titled "Proposal Submission: |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 2. Are costs broken down and completed as set forth in this RFP titled "Cost Proposal"? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | 3. Are on-line applications quoted as "extra"? |

IMPORTANT NOTE: Contractors are cautioned against inadvertently including any cost information with their technical proposals. Inclusion of any cost information in the technical proposal may disqualify the proposal.

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Key Legal Conditions

- ☐ Yes ☐ No 1. Does the Contractor agree to be the primary contractor for the purposes of implementation and subsequent support of services provided under any contract entered into pursuant of this RFP?
- ☐ Yes ☐ No 2. Is the proposal offered at an all-inclusive fixed price in strict accordance with the requirements set forth in this RFP titled "Cost Proposal?"

Company Capabilities

- ☐ Yes ☐ No 1. Does your firm demonstrate at least three (3) years experience in the supply and support of municipal CAMA software in Rhode Island/Massachusetts?
- ☐ Yes ☐ No 2. Are your proposed services currently being utilized by other communities in Rhode Island?
- ☐ Yes ☐ No 3. Has your firm provided your proposed services for more than one year to at least five (5) communities?
- ☐ Yes ☐ No 4. Is your firm financially solvent (i.e., currently not bankrupt and currently not considering filing for bankruptcy protection?)

2. Comparative Evaluation Criteria:

- A. **Overview** The Town of Barrington will apply comparative evaluation criteria in deciding which proposal to select from among those that meet the minimum evaluation criteria. Ratings for each criterion will be assigned on the basis of documentation provided by Contractors in response to information requested. The Comparative Evaluation Criteria are:

1. Experience/References	20%
2. Credentials/Qualifications	15%
3. Implementation Plan/Timeline	20%
4. Pricing	15%
5. Suitability of Proposed System	30%
<hr/>	
Total	100%

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Proposed solutions will be rated against the list of functionality drawn up by the Town as expressed in the attached document 'Specifications Checklists for Full Revaluation / CAMA Installation and Data Conversion'. Contractors are required to complete this checklist for their proposed solution, which will be reviewed by the Town during the evaluation process. Failure to reply in the affirmative to all questions does not automatically eliminate proposals, rather is an attempt to identify those proposals which will give the Town the greatest opportunity to advance its systems and procedures within its available budget.

- B. **PROFILE /EXPERIENCE:** The Town wishes to learn about each of the Contractors and their ability to deliver the specific services identified in this RFP. This section is viewed as part of the Contractor's responsiveness to this RFP and responsibility in meeting the scope of services. Contractors shall provide responses or reference to other areas of the proposal where this information can be found. This section will be rated as part of the minimum and comparative evaluation criteria sections of this RFP.

1 **Company Information:**

- a. Company Name: _____
- b. Home Office: _____
- c. Telephone: _____
- d. Nearest sales/support office address: _____
- e. Telephone: _____
- f. Name of contact person: _____
- g. Telephone: _____
- h. Number of years company has operated under this name: _____
- I. Year company was founded: _____
- j. Brief description of the nature of your company's business _____

- k. Number of years company has been in present location _____
- l. Type of business organization _____

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2 Company Experience:

Please list at least three (3) current customers of the similar proposed services and products. Please provide references bearing in mind the comparative criteria listed elsewhere in this document.

Please include the following information for each reference:

City/Town #1

- a. City/Town Location: _____
- b. Address: _____
- c. Customer Contact: _____
- d. Title: _____
- e. Telephone _____
- f. Description of Services Performed: _____
- g. Date work began: _____
- h. Updates carried out after initial implementation: _____
- I. Approximate number of residents in city/town: _____
- j. Approximate number of parcels in city/town: _____

City/Town #2

- a. City/Town Location: _____
- b. Address: _____
- c. Customer Contact: _____
- d. Title: _____
- e. Telephone _____
- f. Description of Services Performed: _____
- g. Date work began: _____
- h. Updates carried out after initial implementation: _____
- I. Approximate number of residents in city/town: _____
- j. Approximate number of parcels in city/town: _____

City/Town #3

- a. City/Town Location: _____
- b. Address: _____
- c. Customer Contact: _____
- d. Title: _____
- e. Telephone _____
- f. Description of Services Performed: _____
- g. Date work began: _____
- h. Updates carried out after initial implementation: _____
- I. Approximate number of residents in city/town: _____
- j. Approximate number of parcels in city/town: _____

City/Town #4

a. City/Town Location:

b. Address:

c. Customer Contact:

d. Title:

e. Telephone

f. Description of Services Performed:

g. Date work began:

h. Updates carried out after initial implementation:

i. Approximate number of residents in city/town:

j. Approximate number of parcels in city/town:

3 Company Performance:

☐ Yes ☐ No

a. Has your company ever failed to complete any work awarded? If the answer is yes, please state all circumstances.

☐ Yes ☐ No

b. Has your company had any adverse legal judgments that have resulted against your company due to alleged performance with the past five years? If yes, please explain below.

☐ Yes ☐ No

c. Does your company have a full-time support staff? Please speak to how a "support" call would be handled and the estimated time to successfully closing the call. Also speak to normal support hours and 24/7 capability, if any.

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- C. **IMPLEMENTATION PLAN FOR CAMA INSTALLATION AND DATA CONVERSION:** Contractors are required to submit an Implementation Plan demonstrating they possess an orderly and structured plan capable of supporting a project size and complexity of this RFP, and complying with the scope of work set forth in this RFP. The Implementation Plan will be rated during the Evaluation Criteria stage. Following award of a contract, this plan will be subject to a formal critical evaluation to be conducted jointly by the Town of Barrington and Contractor during which mutually acceptable changes may be made. Town of Barrington's approval of the plan is required before the Contractor may proceed with system implementation.

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Contractors are encouraged to use their own format in preparing an Implementation Plan.

IMPLEMENTATION PLAN FOR FULL REVALUATION: Contractors are required to submit an Implementation Plan demonstrating they possess an orderly and structured plan capable of supporting a project size and complexity of this RFP, and complying with the scope of work set forth in this RFP. The Implementation Plan will be rated during the Evaluation Criteria stage. Following award of a contract, this plan will be subject to a formal critical evaluation to be conducted jointly by the Town of Barrington and Contractor during which mutually acceptable changes may be made. Town of Barrington's approval of the plan is required before the Contractor may proceed with system implementation. Once approved by the Town of Barrington, the Implementation Plan shall be incorporated by reference into the contract.

- 1 **Project Approach:** The Implementation Plan must demonstrate how the Contractor proposes to implement the scope of work identified in the RFP.
- 2 **Work Products:** Describe the principal work products to be delivered, and projected completion date for each.
- 3 **Tasks and Time Schedule:** List the principle tasks necessary to produce each work product identified above, and the projected completion date for each. During implementation, this plan must be updated regularly to reflect latest estimates on the actual status of the project. This list must identify clearly which tasks are the responsibility of the contractor, and which are the responsibility of the Town of Barrington.
- 4 **Payment Schedule:** Identify key points at which payment is expected based on Town of Barrington acceptance of key work products. Funds for data conversion and CAMA installation (if any) are currently available. Funds for the actual Statistical Revaluation will be drawn from the 2008/2009 fiscal year.
- 5 **Project Control:** The implementation Plan must demonstrate how the Contractor's proposal provides for regular status and progress monitoring

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- 6 **Reporting Format:** Provide a format for reporting to the Town of Barrington's project manager. Reports must permit the Town of Barrington's project manager to maintain knowledge of project status, verify project progress as reported by the contractor, and ensure that work products conform with specifications and requirements.
- 7 **Meeting Format:** Provide a format for meetings between the Town of Barrington's project manager and the Contractor's project manager to review the routine project status reports and related matters.
- 8 **Methodology of Decision-Making:** Provide a mechanism for clarifications and decision-making during the course of the engagement, including the implementation phase.
- 9 **Written Guarantee:** The contractor shall submit a signed written statement guaranteeing:
- a. The ability to commence providing services by the date specified by the request for proposals.
 - b. The ability to carry out the full volume of services specified in detail in this request for proposals.

HARDWARE REQUIREMENTS

No.	Request	Contractor's Response
1.	List minimum/recommended hardware requirements for server(s):	
2.	List minimum hardware requirements for workstations (may specify minimal and suggested)	
3.	List the minimum network requirements for the proposed products	
4.	What are the known performance constraints encountered as the system grows?	
5.	List the supported and/or preferred operating system platforms for clients and servers	
6.	List any additional software or utilities required to make your proposed system work properly (show clearly which items are included in the price proposal).	
7.	Explain licensing requirements for both your proposed system and required additional software or utilities	
8.	List other supported hardware, such as; printers, scanners, digital cameras, etc. which may be required;	

DEVELOPMENT PLANS

No.	Request	Contractor's Response
1.	Explain your general plans for future application development over the next five (5) years.	
2.	Describe typical testing procedure before release of software	
3.	Describe typical user testing arrangements	

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GENERAL QUESTIONS

No.	Request	Yes / No	Contractor's Response
1.	Are releases of software managed with numbered versions and full release notes?		
2.	Is it possible for a customer to tell what versions of software are being run.		
3.	Can local customizations be made to the software?		
1.	Do such local customizations persist through version upgrades?		
2.	What is the typical frequency of maintenance releases & bug fixes?		
3.	Can releases be refused without voiding support agreements?		

ARTICLE 4. ACCEPTANCE/REJECTION OF BIDS:

The Town has the right to accept or reject for any reason all bids in part or in whole or to accept any proposal deemed to be in the best interest of the Town of Barrington.

ARTICLE 5. CONDITIONS OF WORK:

The Contractor shall not commence work under this contract until he has obtained all insurance required and such insurance has been approved by the Town. Approval of the insurance by the Town shall not relieve or decrease the liability of the Contractor hereunder.

1 Workers' Compensation and Employer's Liability Insurance:

The Contractor shall take out and maintain during the life of this contract the statutory Workers' Compensation and Employer's Liability Insurance for all of his employees to be engaged in work on the project under this contract and in case any such work is sublet.

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2. **Bodily Injury Liability and Property Damage Liability Insurance:**

The Contractor shall take out and maintain during the life of this contract such Bodily Injury Liability and Property Damage Liability Insurance as shall protect him and any subcontractor performing work by this contract from claims for damages for personal injury, including accidental death, as well as from claims for Property damage, which may arise from operations under this contract, whether such operations be by himself or by any subcontractor or by anyone directly or indirectly employed by either of them and the amounts of such insurance shall not be less than:

- A. **Bodily Injury Liability Insurance** - in an amount of not less than one million dollars(\$1,000,000) for injuries, including wrongful death, to any one person; in an amount not less than one million dollars(\$1,000,000) per accident
- B. **Property Damage Insurance** – in an amount not less than five hundred thousand (\$500,000) for damages per single accident and in an amount no less than one million dollars (\$1,000,000) for damages on all accidents.
- C. **Automobile Liability Coverage**- including coverage for owned, hired or borrowed vehicles, providing limits of \$1,000,000 each occurrence.

ARTICLE 6. TIME FOR COMPLETION:

CAMA installation and data conversion should be completed by **January 1, 2011**. Work (other than data conversion) on this project shall begin by **December 15, 2010** and be completed no later than **May 15, 2011**.

ARTICLE 7. PERFORMANCE CLAUSE:

Work on this project shall be done in conformance with the above timetable. Prompt completion of this project within this schedule is essential. Should this timetable fail to be met, **one-thousand dollars (\$1,000)** per day will be assessed for liquidation damages for any amount of work not completed by the due date and will be deducted from the final payment.

ARTICLE 8. BID BOND:

A bid bond or certified check in the amount of ten (10%) percent of the bid shall be submitted with the bid.

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ARTICLE 9. NON-COLLUSION:

The Bidder certifies that he will not offer or give gratuities, favors, or anything of monetary value to any officers, employees, or agents of the Town of Barrington. The Bidder is fully informed respecting the preparation of the attached Bid and all pertinent circumstances representing such Bid, also that such Bid is genuine and is not a collusive or sham Bid.

The Bidder also certifies that neither the said Bidder nor any of it's officers, partners, owners, agents, representatives, employees, or parties in interest, has in any way colluded, inspired, convinced or agreed, directly or indirectly with any other Bidder, firm or person to submit a collusive or sham Bid in connection with the Contract for which the attached Bid has been submitted or to refrain from bidding in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement, or collusion or communication or conference with bidder, firm, person to fix the price or prices in the attached Bid or prices of any other Bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement, any advantage against the *Town of Barrington* or any person interested in the proposed contract.

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TECHNICAL PROPOSAL SIGNATURE PAGE

The attached "Technical Proposal", due no later than November 24, 2010 at 2:00 p.m. is hereby submitted to the Assessor's Office of the Town of Barrington by:

Company: _____

Address: _____

Phone: _____

Signature: _____

Name: _____

Title: _____

Email: _____

Date: _____

SUBMIT IN SEPARATE SEALED ENVELOPE.

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COST PROPOSAL SIGNATURE PAGE

The attached "Cost Proposal", due no later than **November 24, 2010** at 2:00 pm. is hereby submitted to the Tax Assessor's Office of the Town of Barrington by:

Company: _____

Address: _____

Phone: _____

Signature: _____

Name: _____

Title: _____

Email: _____

Date: _____

SUBMIT IN SEPARATE SEALED ENVELOPE.

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DETAILED COST PROPOSAL

REVALUATION UPDATE AND TRAINING COSTS:

- A. Revaluation Update \$ _____
- B. Based on a parcel count of 6,700 parcels _____
- C. Price per parcel equals: \$ _____
- D. Software Conversion Cost: \$ _____
- E. Other Required Costs: \$ _____

UPDATE & CONVERSION COST: \$ _____

1ST YEAR MAINTENANCE: \$ _____

COURT TESTIMONY: \$ _____ (after first fifteen (15) days)

Bidder understands that the Town of Barrington reserves the right to reject **any or all bids** and to waive any informality in the bidding.

Bidder agrees that this bid shall be good and may not be withdrawn for a period of thirty (30) calendar days prior to the scheduled closing time for receiving bids.

Upon written notice of the acceptance of this bid, bidder shall immediately execute the formal contract within thirty (30) days and deliver a Surety Bond or Bonds. The Bid Security attached in the sum of \$ _____ which is ten (10%) percent of the bid price and is to become the property of the Town in the event the contract and bond are not executed within the time above set forth, as liquidated damages for the delay and additional expense to the Town caused thereby. If the Bid Security is submitted in the form of a Certified Check, it shall be made payable to the Town of Barrington, RI.

(Signature)

(Type or legibly print name)

(Company Name)

(Date Signed)

Notary Public (or Legal Officer)

State of _____ county of _____

Subscribed and sworn to before me at (time) _____ on this the _____ day of _____

2010

My commission expires (date of expiration) _____

(Signature of Notary (or Legal Officer))

This statement will not be considered complete unless it is signed and notarized

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ADDENDUM

REQUIREMENTS FOR SOFTWARE CONVERSION

I. MINIMUM REQUIREMENTS (VENDOR RESPONSE REQUIRED, WHERE APPROPRIATE)

A The Town's Tax Assessor shall reject proposals, which do not meet certain minimum requirements. These

- 1 The Town Manager **must** receive a proposal before the deadline for receipt of proposals.
- 2 The vendor **must** certify that it has complied with all laws of the State of Rhode Island relating to taxes and is not currently in arrears in the payment of any obligation due and owing the State of Rhode Island or any department or unit thereof.
- 3 The software shall be written in a relational database management system (hereon referred to as RDBMS) software language or the equivalent. It will feature a graphical user interface.
- 4 The software should be an outright purchase. There should be no mandatory fees required after the software purchase. The vendor must disclose all fees in the cost section.
- 5 Vendor shall submit a list of the municipalities for which the Vendor has CAMA installations.
- 6 Vendor shall submit written assurance that the CAMA software will meet the Town of Barrington requirements.

II. TECHNICAL REQUIREMENTS

- | | | | | | |
|----|---|-------|-----|-------|----|
| 1 | A. Relational Database | _____ | Yes | _____ | No |
| | B. Years of proven proposed RDBMS Installation | _____ | | | |
| 2 | Software Modules | | | | |
| | Commercial | _____ | Yes | _____ | No |
| | Digital Imaging | _____ | Yes | _____ | No |
| | GIS Interface | _____ | Yes | _____ | No |
| | Income System | _____ | Yes | _____ | No |
| | Personal Property | _____ | Yes | _____ | No |
| | Residential | _____ | Yes | _____ | No |
| 3 | Network Ready | _____ | Yes | _____ | No |
| 4 | Full on-line documentation | _____ | Yes | _____ | No |
| 5 | A. Number of proven RDBMS User Installations | _____ | | | |
| | B. Include the installed applications where your proposed relational systems are installed. (User list must be provided with Vendor's response.) | _____ | Yes | _____ | No |
| 6 | A. The Vendor's Software License <u>must</u> be a direct purchase agreement, exclusive of any mandatory fees; I.e. all fees should be so stated in the cost section (no hidden fees) | _____ | Yes | _____ | No |
| | B. Maintenance support agreement must be voluntary. | _____ | Yes | _____ | No |
| 7 | The Software Vendor <u>must</u> have full-time systems/programming, maintenance and development staff (resumes required/ years of experience) | _____ | Yes | _____ | No |
| 8 | The Vendor <u>must</u> have currently installed (proven) laser-printing technology for property record cards/reports (preferably dual side printing). | _____ | Yes | _____ | No |
| 9 | The software <u>must</u> support on-line property images, which are integrated with the CAMA module. The user should have the ability to add or delete images on the file. | _____ | Yes | _____ | No |
| 10 | Vendor's software license agreement copy <u>must</u> be included in this bid, as well as, maintenance fees, other support fees and system/programming support fees. | _____ | Yes | _____ | No |
| 11 | The Vendor <u>must</u> supply a schedule for conversion of the data and installation of the software. | _____ | Yes | _____ | No |

III. SOFTWARE SPECIFICATIONS

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- A The new software shall be written in a RDBMS language or the equivalent. The software should feature a graphical user interface.
- B The vendor should be able to electronically convert the computerized data files currently employed by the Tax Assessor's Office including the sketches. If unable to convert electronically, please include a conversion cost (if any) on the Cost Proposal page.
- C Ability to perform calculations and formulas essential to the development of property values using all the necessary schedules and factors.
- D Ability to manage data by providing statistical analysis of values and sales for various parameters and to compute new values consistent with market values, and in accordance with the laws of the State of Rhode Island
- E The system should have menu-driven screens, but be flexible enough not to impede the experienced user.
- F System security should function at both the user and application level.
- G Ability to automatically update shared data to all files.
- H The system should provide a report on all transaction activity, including exception reports, for an audit trail.
- I Ability to "lock" other users out of a file and/or record so only one edit/update can be performed at a time.
- J Ability to change or add to the existing tables
- K Ability to enter the following data:
 - l Property ID:
 - Plat Number - two (2) characters
 - Lot Number - three (3) to six (6) characters (condominiums consist of more than three (3) digits)

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2 Land Data

Neighborhood Description
Lot Size (In square feet)
Zoning Designation
Notes on land pricing

3 Building Detail, Including;

Accessory apartment(s)
Actual year built
Air Conditioning Type (if any)
Bathroom count
Bathroom Style (modern, original, etc.)
Bedroom count
Economic depreciation
Functional depreciation
Heating fuel
Heating type
Kitchen Style (modern, original, etc.)
Occupancy (1-fam, 2-fam, 3-fam, etc.)
Overall building height
Overall grade or quality
Physical depreciation
Roof cover
Roof structure
Special condition depreciation
Story height
Style (Colonial, Ranch, Victorian, etc.)
Three interior floor types
Three interior wall types
Total room count
Two exterior wall types

L Ability to enter and store notes and comments on the property.

M Ability to enter other information and data, including special features and yard items.

N Ability to enter and generate a scaled sketch of improvements.

O Ability to edit the sketch without having to re-enter data.

P Ability to produce values on property sections, including:

Land value
Outbuildings/extra features
RCN (replacement cost new) building values
RCNLD (replacement cost new less depreciation) building values
Special land value (current use)
Total value
Value override

Q Sales analysis and statistical module:

- 1 Sales extract by month and year
- 2 Maintainable extracted sales file
- 3 Sales analysis stratification by:
 - Building size
 - Building use type
 - Land size
 - Location factors
 - Normal depreciation
 - Physical factors
 - Primary valuation models
 - Sales year
 - Total assessed value
 - Vacant land sales

R Square Foot land pricing that can be implemented across the entire master file simultaneously.

S Separate recalculation of sales and master files.

T Statistics which include, at a minimum:

- Coefficient of Dispersion (COD)
- Mean, median, mode
- Standard deviations

U Comparable sales report with a minimum of five (5) comparables that includes images

V Ability to produce all reports required by the State of Rhode Island.

W Ability to calculate and print totals by Rhode Island Land Use Code and Class.

X Capability to print mailing lists and labels.

Y Ability to produce economy of scale building size adjustments.

Z Ability to store valuation history.

AA Ability to perform ad-hoc queries on all data located in the database and to produce hard copy reports or electronic file exports.

BB. The system should have an interactive on-line help facility keyed to all functions.

CC The system should include training materials in the form of training manuals, reference manuals and sufficient on-site training for employees.

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- DD System should allow for multiple updates to a single file and/or database by multiple users.
- EE The system should provide ability to validate data entered in an entry screen; i.e. by range/value checking, data type edits checks, etc.
- FF The system should be able to produce an income approach to value for all commercial and industrial properties.
- GG Ability to interface with GIS System.
- HH The system should have the capability to allow the public to access data through a taxpayer screen.

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Functional Requirements Checklist Worksheet Instructions

These checklists identify the software functionality required by module. This list is not meant to be all inclusive, but rather established minimum specifications required by the Town of Barrington. Successful bidder is responsible to gather the necessary information to ensure it meets all the requirements required by the Town of Barrington. Each checklist has the same format with six columns, three available for input. The fourth column titled "Available" should be used to identify whether or not the particular feature or functionality is available in the software. The Valid responses for the "Available" column are:

Response	Meaning	Explanation
Y	Yes	Currently available and functioning in the software version being proposed
N	No	It is not currently available in the software version being proposed

The "Custom" column is used to identify features of functionality not currently available in the software. This column should only be used when the response to the "Available" column is "N". The valid response for the "Custom" column is:

C	Custom	Custom enhancement for which the Town will be charged
F	Future	Future enhancement for which the Town will not be charged
S	Scheduled	Already scheduled for a future release for which the Town will not be charged
X	Not Scheduled	Feature is not in development at this time

Any item that has either a "C" or an "F" response should be added to the cost proposal and should include an available date.

The column "Comment" can be used for additional information. Any response in the "Available" column other than a "Y" will be considered an "N".

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CAMA Functional Requirements

COMMON FUNCTIONS							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Utilize an Oracle (or equal) RDMS and a GUI front end.							
Be able to export data from CAMA to the Municipality's tax collection systems (new system not yet in place)							
Maintain audit trail of all user changes to information on the Property Record Card.							
All modules of the new software will have on-line help available.							
Provide the ability to move between screens via a single click.							
Provide the ability to copy all data from one parcel to another.							
Provide the ability to make global/group update changes.							
Support multiple parcel search capabilities.							
Allow parcel searches that create subsets of parcels. Provide a table that allows a user to view and access parcels in the subset.							
Provide the ability to add, change, and update all fields which appear online.							

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Provide a system that is table driven (e.g., user defined edits) and provide a comprehensive facility with on-line screens to maintain reference data.								DRAFT
Allow field labels to edited, enabled or disabled by the user.								
Allow user to define field properties including- data type, allowable table and whether the field is optional or required.								
Provide flexibility to adapt to changing legislation.								
Provide security at the screen/transaction level.								
Capture transaction history (e.g., transaction name, user id, date, and time) and change information (e.g., before and after data and values) for all adds, changes, and deletes.								
Provide access to transaction information.								
Support comprehensive context sensitive on-line help for all screens.								
Provide comprehensive user training.								
Support on-line system manuals including a table of contents and search capability.								
Provide access to a help desk for user inquiries during normal business hours. (Please state hours.)								DRAFT

COMMON FUNCTIONS							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Accesses help information without exiting the active transaction.							
Allow property to be marked as fully or partially tax exempt.							

PARCEL MANAGEMENT APPLICATION							
Parcel Record Maintenance							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Maintain legal description of property. Support large field size to fully capture a lengthy legal description.							
Provide the ability to attach scanned or electronically created materials to individual records (e.g. a scanned-legal description from a deed).							
Allow for multiple or mixed use codes on single parcels. Multi-use parcels will also, at a minimum, capture percent of residential use.							

Assessment Notices							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Produce assessment notices or output file for printing of notices for all properties.							
Produce assessment change notices for new construction or property improvements.							

CAMA APPLICATION							
Basic Appraisal Functions							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Support the 3 standard approaches for property valuation: Cost Approach, Income Approach (commercial properties only) and Market approach (including multiple regression analysis).							
Support unlimited land and building valuation algorithms.							
Provide ability to compare values by approach for properties that are valued by more than one approach.							
Allow on-line update and printing of property record cards and work documents.							
Support on-line mass appraisal to assess multiple properties at the same time - by neighborhood, model type, zoning, a user-specified list of parcels, or by property type and class.							
Support separate valuation methods for each class of real property.							
Maintain a historical record of the original assessment values, revised assessment values, and date of change.							
Allow properties to be valued and revalued using different methods during each year. Track each change.							
Provide for the appraisal of special purpose property classes including the valuation of low or moderate income housing and tax exempt or abated properties.							

Basic Appraisal Functions							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Provide a method for automatically grouping parcels for the assessors' field inspections by neighborhood, property class, building type, construction permit and those requiring sales verifications.							
Provide a field(s) for assessor comments on the property record card.							
Provide the ability to view and update all property characteristics on-line.							
Allow each section of a house/building to be fully described (including % complete) and valued separately.							
Provide the ability to list the percentage complete and value attributable to each part of a building that is less than 100% complete.							
Provide fields for separate property descriptions for outbuildings and improvements. Allow grading and size adjustments to be applied.							
Provide the ability to set size ranges on all outbuildings and extra features.							
Store cost-based appraisal rates for common outbuildings. Identify outbuildings which do not have a rate or flat value associated with them and allow user-defined rates to be input to the cost tables.							
Allow a variable and expandable number of fields to record property dimensions for even the most complex structures, and provide automatic calculation of total building area from the property sketch.							

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Basic Appraisal Functions							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Allow different user interfaces for different types of properties. (Residential, Commercial, Condos, etc.)							
Support the use of condo main parcels that describe all sections of a condo complex.							
Support copying property characteristics from one parcel to one or more parcels.							
Provide the ability to apply different depreciation rates to multiple buildings on the same record.							

LAND							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Value land by multiple measures including, but not limited to, acreage, square foot, front foot, site and building lot value. Provide the ability to adjust land values through percentage and fixed values set by the user.							
Support adjustments for flood plain, easements, land size, and other property features and allow valuation via user defined rates.							
Provide the ability to value contiguous land.							
Provide the ability to value land by cost, regression or by Z contour method.							
Allow the user to assign all valuation methodologies by neighborhood.							

Construction Permit Information							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Provide the ability for the assessor to input, time period, work status, inspection date and comments.							
Provide the ability to print a parcel's permit information.							
Record progress dates for beginning construction, final construction, and inspections.							
Provide the ability for the assessor to view a history of permits for each parcel.							
Provide the ability for the Building Inspector's software to link directly with the corresponding fields on the property record card							

Store Commercial Property Information							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Support multiple buildings and/or properties per appraisal unit on commercial properties.							
Support multiple parcels per building for commercial property.							
Provide the ability to view vacancy figures, rental figures, and other neighborhood rental information by property type.							
Provide the ability to view on-line current and historical income and expense survey data per property.							

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Provide the ability to add, insert, delete, and selectively update tenant data and to perform lease analysis on stored tenant data.							
Provide the ability to capture tenant leasable area, lease date, actual rent, and market rent or economic rent.							
Support lease analysis capability to validate and test direct capitalization data.							
Cost Approach							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Provide a cost estimate for all building dimensions and features recorded for a property description. This should be done using one or more user definable valuation models.							
Provide flexibility to apply a particular cost algorithm to a neighborhood.							
Allow assessors to manipulate and edit cost algorithms.							
Provide the ability to update property depreciation by section when the effective age of a building section is changed.							
Provide for the estimation of replacement cost new and replacement cost new less depreciation.							
Allow for unlimited depreciation and size adjustment tables.							

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Sales Trending							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Support trending for total property value (e.g., land and improvements).							
Support use of a qualified sale after a parcel has been changed (a qualified sale that occurred prior to a subdivision or remodeling remains useful in market analysis approach valuation).							
Support the use of a qualified land sale in the sales trending approach to value after a property has been improved.							
Support ability to store note with each sales transaction.							
Based on a user defined table of reasons, "cull" sales that are deemed to be unqualified by assessors and mark these sales with the appropriate reason for removal.							
Market Approach							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Utilize unlimited, user definable comparable sales models in application of the direct comparison approach.							
Choose up to twenty comparable properties. Automatically determine the top five comparable sales based on user-entered criteria. Allow the ability to edit the top five choices.							
Provide the ability to use distance when choosing comparables. Spatial data will be provided by the GIS system.							

Multiple Regression							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Provide for a market regression analysis (MRA) procedure.							DRAFT
Allow assessors to specify and store model variables including the ability to support multiple models and statistical options for MRA valuation.							

Assessments Using Income Approach							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Support the one-year direct income capitalization approach to value.							
Store commercial sales data to determine the direct capitalization rates for income analysis valuation.							
Calculate capitalization rates using alternate methods such as band of investment, mortgage equity, and GIM.							
Provide the ability to value commercial condominiums, town houses, hotels, apartments, and other rent mix property types.							
Support valuation using rent and tenant data based on lease analysis of actual tenants.							
Support valuation using vacancy information for various sub-markets.							

Assessments Using Income Approach							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Support assessor override capability for income, expenses, and vacancy when appraising specific properties.							DRAFT
Provide the capability to calculate median and mean rent per unit of measure, expense ratios and overall capitalization rates for any strata of commercial property.							
Capture gross rent, vacancy and collection loss, miscellaneous income, itemized expenses, and corresponding sale price for commercial properties.							
Provide for maintenance of income and expense data using various units of comparison such as net and gross leasable area, apartment units, etc.							

Sketching							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
The system will provide the ability to create new sketches, modify, add, change or delete sketches with automatic computation of the square foot of building area. The sketch package must provide closure problem detection and correction features.							
Support flexible on-line sketching software, which displays story height descriptions, an identifier for each section (e.g. porch, deck), and exterior wall dimensions for all sections of a building.							

REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Support rounded surfaces, angles, and irregularly shaped areas as well as square footage entries.							DRAFT
Sketch program should also work with hand-held and/or pen-based field data devices, including download and upload capability.							
Automatically calculate perimeter and square footage from sketch sections.							
Compute total livable floor area on property from living area dimensions.							
Record detailed physical characteristics for a property, with the ability to describe and sketch each building on a property separately, including detached structures such as garages and sheds and the labeling of these structures.							
Provide the ability to copy sketches from one parcel to another as well as use sketches that are stored in a sketch library.							DRAFT

Sketching							COMMENTS
REQUIREMENTS	Y	N	C	F	S	X	
Sketching software should be mouse driven.							DRAFT
The sketch data should export into various image formats.							

Images, Associated Files							COMMENTS
REQUIREMENTS	Y	N	C	F	S	X	
Support a fully integrated imaging system - view unlimited images within the CAMA system along with associated information.							
Provide the ability to link spreadsheets, documents, voice/digital clips to property records.							

Comparable Sales Database							COMMENTS
REQUIREMENTS	Y	N	C	F	S	X	
Provide a "snapshot" of the property, as it existed at the time of sale for use in sales analysis. Allow correction of the snapshot if it is later discovered that the assessment record did not correctly describe the property at the time of sale.							
Allow an unlimited number of user definable comparable sales algorithms.							

Comparable Sales Database							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Produce an on-line comparable sales query and report based on user-defined criteria.							
Allow comparable sales reports to be printed to hard copy.							
Reports/Inquiries							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Provide the ability to print user definable property record cards that differ by style of property.							
Produce on-line sales analysis reports.							
Produce an on-line comparable sales query and report based on user-defined criteria.							
Support queries on all data in the database using a completely integrated report writer.							
Produce an on-line and printed report of neighborhood data trends, including sales and comparables.							
Provide a number of predefined reports.							
Allow many of the existing reports to be modified and saved by the user.							
Provide a simple manner for locating fields within the database. Users should be able to locate by database field name or screen label.							

Geographical Information System							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Provide the ability to spatially show the distribution of sales.							
Provide the ability to spatially and statistically show property value and other parcel attributes.							
The system will also include specific fields that can be used to delete old or duplicate records from the tax attribute file. At a minimum, the date of the last transaction and a record identification number will be included.							
Provide the ability to view comparable properties on a map.							
Provide the ability to view and query all parcel data within a spatial environment.							
Sales Analysis							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Support on-line and printed statistical analysis of assessments including, but not limited to, sales ratios, coefficient of deviation, price related differentials, and other tests of the level and equity of assessments. The system will allow the results t							
Produce a report which shows an updated coefficient of deviation, stratified and segmented by class, as well as a general coefficient of deviation.							

Basic Appeals							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Allow multiple appeals to be tracked within a given year.							
Allow each appeal to be associated with other parties.							
Provide scheduling functionality and allow appeals to be grouped, at a minimum by attorney, neighborhood, and issue.							
The system will provide support of user-defined tracking identifiers.							
Provide the ability to identify properties that have been appealed in prior years.							
Provide ability to enter notes describing how a property was assessed for use in possible appeal.							
Provide the ability to track all valuation change(s) made as the result of an appeal.							
Provide the ability to view online all appeal history and parcel information.							
Provide the ability to track tax court appeals. Provide fields such as dates, attorney & appraiser names, address & phone #'s for all parties.							
Provide the ability to print daily, weekly, monthly schedules.							

Basic Appeals							
REQUIREMENTS	Y	N	C	F	S	X	COMMENTS
Provide summary reports regarding appeals within tax lists years (e.g., prior year added, current year).							DRAFT
Provide reports regarding the status of hearings, notices, appeals, disposition, and judgments.							